

Expatriation: A Beginner's Guide to Living and Working Abroad

An Honors Thesis (HONR 499)

by

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Abstract

More businesses than ever before are choosing to expand into global markets, causing a large need for expatriates, or workers from one country who move to live and work in a country other than their own. Most of the time, these workers are sent abroad by large multinational organizations which have a dedicated team of human resources professionals. This HR staff trains the expatriates about the culture of the new country, as well as takes care of all the documentation and logistical aspects required when moving abroad. However, more individuals are choosing to become expatriates on their own without help from an organization, and these people must figure out how to complete all the planning and preparation alone. This guide provides a starting point for new expatriates as they navigate the confusing, yet rewarding, challenge of living in another country. While expatriation can occur in any country, this guide specifically focuses on U.S. expatriation to Germany and provides background information about expatriation, documentation, compensation, the process, housing, the German culture, the German language, packing, expatriation with families, and repatriation.

Acknowledgements

I would like to thank Professor Carla Flores for being my advisor for this project. Her love for international travel and expertise in the human resources field made her the perfect advisor for my thesis. I am so thankful for her support and recommendations throughout this process.

I would like to thank Stefanie Stubner for explaining the German rental housing system to me when I was completely lost in translation.

I would also like to thank my parents for their continuous support.

Jessica Benz

Author's Statement

Introduction

Deciding to become an expatriate is an exciting and scary experience. Individuals who leave the United States to live and work in another country give up their comfort and familiar surroundings for a life filled with confusion, miscommunications, and sometimes homesickness. However, the experiences expatriates get to embark upon are completely worth the momentary stress that comes with living in a new culture. While almost anyone can take a vacation to a foreign country, the culture in a new country cannot completely be experienced and absorbed until an individual has no choice but to live as the locals do.

Most expatriates are sent abroad by multinational companies to be managers in foreign offices. These expats receive extensive training from the Human Resources Department, and the company helps ensure the individual has as smooth of a transition as possible. Documentation is filled out on the expat's behalf, and logistical needs, such as housing, packing, and school for children, are managed by the organization. While expatriates who are sent abroad by an organization still face challenges, most of their concerns are taken care of by a team of experts, which minimizes the planning and preparation required by the travelers.

International business experience is a massive résumé booster when applying for an upper-management position. Due to increased globalization, more and more individuals want to travel and work outside of the U.S.; however, workers are embarking on the expatriation journey on their own, rather than waiting for an organization to provide the opportunity. While this is a great way for workers to obtain international experience, planning the expatriation experience alone is a daunting and strenuous process, especially for people who have no background in foreign travel or human resources. When expatriate travel is not planned properly, the

assignments are likely to fail, and the expatriate is more likely to return home early. With proper preparation, U.S. citizens wanting to gain international experience can have a successful adventure abroad and minimize the stresses that come with assimilating to a new culture.

Why This Topic?

When I was in high school, my family hosted a Japanese exchange student named Aika for an entire school year. Since Aika and I shared a bedroom and were involved in many of the same extracurricular activities, we became very close friends. She often shared information about her culture with me, and I was completely fascinated. It amazed me how much we had in common, even though our lifestyles were completely different. Although Aika was coming to the United States to learn about our culture, I wanted to be completely immersed in the culture she described from Japan. The following year, my best friend hosted a German exchange student named Stefanie. Once again, I was astounded by the unique German culture, and I wanted to know everything there was to know about her country.

My sophomore year at Ball State, the Miller Business Honors Program began planning a field study trip to Germany and Ireland. Immediately, I knew I would not be able to live with myself if I passed up the opportunity to travel abroad, especially since the plans included five days in Munich, Stefanie's home city. After much consideration and discussion with my parents, I signed up for the field study and began learning about the German culture. Once we arrived in Germany, I felt at home and absolutely fell in love with the country. From the culture and the people to the shops and landscapes, I wanted our field study to last more than two weeks. I wanted to stay in Germany forever!

As part of a project for my study abroad class, I participated in a group research project about expatriation. Before this project, I did not have a firm understanding of what an expatriate was, but I quickly learned that it is a broad term used to describe any individual living in another

country other than their home. I had never really considered the fact that people live long-term in foreign countries, other than military and government workers. After finishing our project, I realized that expatriation sounded like the type of adventure I would enjoy, and I decided to look into the process for becoming an expatriate. During my search, I quickly recognized that no formal guide books had been written about the expatriation process. While I was able to find a cultural guide book for any country imaginable, none of this literature described how to move and become a permanent resident of a new country, rather than just a tourist. I decided to use this topic as my thesis and create a guide for two reasons: I personally want to use the information to expatriate in the future, and I believe it will be a useful resource for other individuals wanting to move abroad without the help of a large corporation.

I specifically chose Germany as the country of focus for this project for a number of reasons. I personally wanted to know more about the documentation process to live in Germany. Also, Germany is the economic and business center of Europe. Finally, not choosing a specific country would have made the document too long and confusing. Ever since I studied in Germany, I have felt a strong connection to the German culture. I love their directness, their language, and their customs. I believe Germany is a great place to start when looking for expatriate information, and many European countries have similar processes, even though the cultural information may be different.

My Advisor

My field study trip was taught by Dr. Montag-Smit, an HR professor in the College of Business. She asked Professor Carla Flores, another HR professor, to join us on the trip, since Professor Flores had experience with foreign travel, both on her own and for university purposes. This field study was the first time I had met Professor Flores, but I took an additional HR class with her the following spring and expressed my love for international travel. After explaining my

thoughts for this thesis, she recommended a few resources to explore and agreed to be my advisor. Professor Flores used her expertise to help me select chapter topics for my guide and present them in an easy to understand format, similar to what an HR department would use for training. Professor Flores's guidance has been imperative to my success as a student at Ball State, and I am so glad she was willing to give me advice and challenge me throughout this entire process.

Research

Before picking my thesis topic, I researched books available on Google and Amazon to see if any expatriate guide booklets were currently being offered. I was unable to find anything expatriate related, beside cultural and country booklets used when vacationing abroad. While these books are great for vacations, they do not address the information needed to *live* in a new country. After officially picking my thesis topic, my advisor supplied me with a few expatriate training videos to watch, as well as a few websites to get me started on my search for information. A multitude of expatriate websites exist, but no single website provides all the information an expat would need, further emphasizing the need for a comprehensive and concise guide.

After completing my initial research, I decided to create a list of topics I wanted to focus on: what is an expatriate, documentation, the process, the timeline, housing, service providers, culture, language, packing, expatriation with families, and repatriation. I started with the first topic and researched general information about the definition of expatriation and what it means to become an expat. Additionally, I wanted to highlight the pros and cons of expatriation for individuals who were just beginning to think about this process, but had not yet weighed the positives and negatives associated with moving out of the country. Finally, I decided to include types of expatriate assignments. Even though this guide is primarily for individuals trying to

expatriate on their own, having a list of typical types of assignments used by corporations allows individuals to consider the different options available.

Once I found the expatriation information I needed, I decided to skip to the language section. During the research for this chapter, I explored the different options available for learning foreign languages. Thanks to modern technologies, more resources than ever exist for language learning. As someone who is trying to learn German, one of the most useful tools I have discovered is Duolingo. This website and app turns language learning into a game, which keeps users interested and engaged. In addition to listing different resources, I also researched common terms needed when moving to a new country.

After I had a sufficient amount of information regarding the German language, I decided to research packing tips for expatriates. Unlike tourists, expats must precisely consider which items they want to bring, because more than likely, the items they leave behind will have to be sold or placed in storage. Additionally, it can become expensive to mail multiple, heavy boxes overseas, but it is also expensive to bring multiple, heavy bags onto planes. Through my research, I wanted to discover what items were recommended to bring and to leave at home by reading blog posts from seasoned expatriates.

Next, I decided to focus on families and repatriation. When expats move abroad for assignments at least one year in length, the families of those individuals typically move abroad as well. This brings about a whole new set of challenges, such as establishing daycare providers, enrolling children in school, and finding a job for the trailing spouse. Also, a family member who is typically not considered is the family pet. Is the dog or cat brought along, or are they better off being rehoused to a friend or relative before moving? Additionally, I wanted to know what rules, if any, Germany has when it comes to pet ownership. After researching families, I focused on repatriation. Often times, individuals get so excited about the new opportunity to live

abroad that they forget about the repatriation process, or get acclimated to the U.S. customs and culture upon return. While this is not a huge consideration during the initial planning process, it can be difficult for individuals to move back home, and this must be considered eventually, especially when children are involved.

Housing and service providers were the next two topics I decided to explore. From talking with Stefanie and Professor Flores, I knew housing in Germany was more expensive than in the U.S., but I did not know how the rental system worked compared to the U.S. system. I decided to compare the payment of utilities and rent in our country to that in Germany. Additionally, I wondered if the general layout of homes was any different than it is in the U.S. Since Germany has much less land, I figured houses were probably not as large, but I was not sure exactly how floorplans were described and arranged.

Since I had traveled to Germany before, I knew tourists could only stay in the country for 90 days on a regular passport; however, I was not sure what types of visas existed for different types of workers. In the U.S., we have different visas, allowing for different types of work, international students, and other foreign residents. I wanted to know how our system compared to the system used in Germany, as well as how to go about applying for this documentation if expatriation was desired. Additionally, I wanted to research the cost of obtaining a visa, as that is an important factor to consider when examining expat options.

I decided to save my three most difficult topics to research last: culture, the process, and the timeline. While it is fairly easy to find information about the German culture, it is difficult to decide what the most relevant information is to portray in a limited amount of space. Finally, I decided geographic, business etiquette, holidays, food, and cultural attributes were important topics to consider. I also kept in mind that my guide is supposed to focus on expatriation, not just culture, and that my guide could be used as supplemental material to a German culture book.

Because of this, I tried to keep this research brief, yet informative. When investigating the expat process and timeline, I had a difficult time discovering definitive information, primarily because the expat process is very individual, and no two people will experience it the same way. Instead of creating an elaborate and absolute process to follow, I decided to research the different ways to become an expatriate, as well as a general timeline of things to do right before leaving. I wanted to create a checklist readers could physically complete before their move to ensure a smoother transition.

Writing and Editing

Once I researched each of these topics, I began the writing process. Since I did not research each topic in the order I intended to write them, I decided to write each chapter in the same order in which I researched them, starting with expatriation and ending with the timeline. While I originally had eleven topics on my list, I combined housing and service providers into one chapter and the process and timeline into another chapter. For ease of editing and since I was initially unsure how to format my final product, I wrote the text portion of my thesis in Microsoft Word. After turning my research into coherent chapters, I sent my work to Professor Flores, who recommended I include a chapter on compensation, as well as add chapter overviews to each section. We discussed the purpose of the document and contemplated the fact that some readers may only be interested in specific sections and will want to know what information is covered in each chapter to ensure they are getting the information they need. Once I added this extra chapter and highlighted the subtopics in each section, I sent my document back to Professor Flores for feedback, who gave me the go-ahead to start the formatting phase.

Editing and Formatting

After writing my entire document on Microsoft Word, I decided to format my booklet on Microsoft Publisher. I had used Publisher to create a newsletter for a student organization in the

past, but constructing an entire 50+ page document seemed like a daunting task, especially when I had never created anything like it before. I knew I wanted my booklet to be something travelers could easily slip into a purse or backpack when on a plane or subway, so I understood the standard 8.5" by 11" paper was going to be unfeasible. Unsure of what size to use, I started looking at my bookshelf and picked up a small novel I had recently received at an HR conference. The booklet fit perfectly inside my bag, and the page size made it easy to read without feeling overwhelmed by the amount of information on each page. After measuring the booklet, I discovered it was 8.5" by 5.5", or a sheet of regular paper turned to landscape style and folded in half. In reality, it took me much longer to realize this than it should have, but by this point, I was mentally fried from all my researching and writing.

It took me approximately 45 minutes to determine the proper way to set up an 8.5" by 5.5" booklet on Publisher, but once I found the correct template, I quickly realized that Publisher has the ability to determine which pages need to be printed next to each other for the document to print properly. This gave me much relief, as I had previously believed I would have to calculate this myself and type pages in an unchronological order. Since each of my chapters was already typed on Word, I simply had to create a text box on each page and copy the proper section over to the new program. However, this quickly became a challenge, because the textboxes would not maintain the proper font and text size when I pasted new text. I tried researching a way to autocorrect this problem, but I ended up fixing each page manually, which took considerably more time than I expected.

After all my text was inserted and properly formatted, I began the processes of adding my pictures, graphs and table of contents. I examined each chapter individually and made a list of the pictures and graphs I needed, as well as what page they should each go on. Most of the photographs I used came from my study abroad experience, while the rest were retrieved from

Google to emphasize specific information on that page, such as the type of electrical sockets used in Germany or the traditional meal served for dinner. Once the pictures and picture descriptions were inserted, I created a table of contents. I had previously produced a table of contents on my Word document, but, once again, I ran into formatting issues when the text was copied over, so I had to redo the formatting and page numbers.

My final touches included creating the booklet cover and printing the document to ensure everything looked polished. I wanted the cover to stand out and for individuals to know exactly what the booklet was for when looking at it. Additionally, when I was initially searching for other expatriate guides, I realized that most cultural or country guides had yellow or bright colored covers. Since the German flag is fairly bright and simple in pattern, I decided it would make a great background. After printing the document, I stapled it together to ensure it had printed properly and began reviewing it for errors. I fixed the minor formatting and grammatical inaccuracies I had missed, presented it to my advisor, and had multiple friends examine my document. I received great positive feedback from all these individuals, so I decided to print a final revised copy and call the project complete.

My Major and Future Plans

While the guide I created does not appear to be directly related to my major, I had to use the knowledge I learned in each of my HR classes to formulate and format the topics and information I wanted to include. Since HR professionals are typically the people who train expatriates in large corporations, I tried to think like an expat trainer and include the information I would want to explain to a training class. When beginning my research, I examined human resources articles and training plans geared toward expatriation to create a list of important topics. Expats who are moving abroad on their own need to receive the same, if not more,

information than expats moving with a company, and I wanted to ensure this was reflected in the information I chose to include.

In the near future, I hope to gain more human resources experience by working as an HR Generalist for an organization in the United States. Since I am from the Louisville area, I would like to work for a medium to large sized organization in this city. I currently have an HR internship with a financial company in Louisville, and I am hoping they will move into the global market soon, so I can continue to pursue my passion at this organization. After gaining general HR experience, I would love to become an expatriate trainer to prepare individuals for assignments abroad. Ideally, I would spend a few years abroad as an expatriate, and then return to the U.S. to train new expats for this experience. I would like to create a training program where I have classroom-type training for six months to a year. After this training is over, I would travel abroad with the expats for one month to get them situated in their new home. If this plan of becoming an expatriate trainer does not come to fruition, I am currently working on learning German, so I could move to Germany on my own to become a long-term expatriate, possibly working as a translator or guide for expats already in the country.

Knowledge Gained

After writing this thesis, I feel as though I have grown immensely as a person by completing this project. Not only was I able to learn about a process I hope to one day utilize, but I was also able to articulate all of this information into an easy to read handbook for others who have an urge to experience new cultures as well. During the creation of this project, I explained to many of my friends and family what I was writing about, and, to my surprise, many of them thought expatriation meant giving up your U.S. citizenship to become a citizen of another country. The unintended negativity associated with this word through me for a loop, and I was

glad I received the opportunity to clear up this misconception. I hope to continue advocating for expatriation in the future, as it will continuously become more important in our global economy.

In addition to the topic knowledge I gained, I was able to learn a completely new computer program by formatting my document on Microsoft Publisher. Pushing myself to use an unfamiliar program was difficult, but I am so glad I decided to stick with it and not switch to Microsoft Word. By utilizing Publisher, I can now show employers that I have experience with this program, which will be needed in my field to create informational flyers and training material for employees. Every aspect of this project was a learning opportunity, and I believe the hard work I put into the project has helped enhance and fine-tune my HR skills and knowledge.

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Germany Edition

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Introduction—What is an Expatriate?

Section Overview:

- Description of who this guide is geared toward
- Definition of expatriation
- Pros and cons of expatriation
- Types of expatriation assignments

Who Is This Guide For?

Have you ever wanted to move to another country?

Does the concept of living in a culture other than our own excite you?

Do you love adventure?

Are you worried about making a huge move in your life?

Then this guide is for you!

Moving out of the United States to live and work in another country is a scary, yet rewarding, process. Many steps must be taken care of before the moving process even begins to ensure a legal and successful transition to the new country. Expatriation is also an individual process, as no two people will be affected the same way. This guide will help give individuals who are new to expatriation a quick overview of how to start the process, the documentation needed, and tips on how to have a successful adventure when moving and getting accustomed to the new culture.

While this process can typically be used for any country, this guide will focus primarily on expatriation to Germany, with specific points about what to expect regarding their culture, food, language, and housing. Additionally, expatriation can be initiated in many ways: finding a job on your own, starting a company abroad, retiring abroad, or being sent by a large company. This guide can be used by any of these types of expatriates; however, individuals who are moving abroad without the assistance of a large company may find the information more useful, as large organizations usually have a dedicated team of HR professionals to help with the expat process.

What Is an Expatriate?

According to the dictionary definition, an expatriate, or expat, is “someone who is living in a country other than their country of citizenship, often temporarily and for work reasons.”¹ Sometimes these individuals relinquish citizenship in their home country to become a citizen of the new country, but this is not typically the case. The word *expatriate* derives from the Latin word “expatriatus”, which translates to someone who has left their home country to live somewhere else. Typically, expatriates plan on returning home at a later date, but others live for years outside of their home country and eventually retire to continue living abroad.²

While expatriation can occur when an individual decides to retire and move abroad, most of the information in this guide will focus on expatriation for work, both for single individuals and families.

Why Do People Choose to Expatriate?

In the past, people chose to expatriate to new countries in order to flee war or political hardship going on in their home country. While this still happens today, it is not the typical reason for expatriation. Many individuals are given job opportunities abroad by the companies they already work for. These opportunities could lead to better positions or promotions upon returning to the U.S. Others decide to leave, because they are simply curious about the world and want to explore. Once some expatriates travel abroad, either for work or pleasure, they find that the foreign countries they visit have higher standards of living and a better quality of life than in the U.S. This causes many people to start families in the new country or move already existing families abroad, seldom returning home to live.

Pros and Cons of Expatriation

While expatriation sounds like a grand adventure, both pros and cons exist when moving abroad, similar to any big decision. These positives and negatives must be strongly considered to ensure you are making the right decision for you and your family. Simply entering into the expat process with rose-tinted glasses may leave you feeling disappointed or frustrated when experiencing unanticipated difficulties. The following

are common pros and cons experienced during expatriation.

Pros:

Learning a Second Language: If expatriating to a country with an official language other than your own, it is likely you will become at least sufficiently fluent in the new language. Even if the fundamentals were learned before moving abroad, full immersion in the new language will help solidify these skills. If young children are also moving abroad, they are more likely to grow up bilingual, speaking both your native language and the native language of the host country.³

International Experience: Having international experience is often looked for when hiring top level executive positions. In fact, 7 out of 10 C-level managers at Fortune 100 companies have held management positions in foreign companies.⁴ As globalization continues to increase, experience abroad will quickly become more and more important to organizations looking to hire talented and seasoned professionals.

Cost of Goods and Services: In some countries, the U.S. dollar goes further than it does in the U.S. For example, it may cost less money to purchase a gallon of milk in Thailand than in the U.S. Many websites exist to calculate the differences in purchasing power and cost of goods in cities around the world. Even in countries where the U.S. dollar does not go as far, expats may find more whole foods and greener products. Germans typically shop for groceries every couple of days rather than once a week, so less preservatives are used to keep food fresh.

Culture and Experiences: Living in another country allows you to experience things which cannot be understood from visiting a country briefly on vacation. When in a country for an extended period of time, expats are able to take trips exploring the countryside or taking in the city without having to cram every experience into a week-long adventure. Experiences do not have to be confined to the host country either. It is fairly easy to travel between countries in Europe, and this allows expats to experience multiple cultures and countries without the added expense of multiple plane rides.

Cons:

Missing Holidays: Frequently flying home to the U.S. for holidays or to visit extended family is highly unlikely and extremely expensive. While many companies include a travel allowance during long-term assignments, this allowance is hardly enough to cover the flight for every holiday. Additionally, not all holidays celebrated in the U.S. are celebrated in foreign countries. Likewise, other countries may have different traditions when it comes to celebrating major holidays. This may be an opportunity to create new family traditions, but the transition could be difficult, especially for children.

Strangerhood: No matter how long you live in a foreign country, you may always be viewed as an outsider, especially in countries where you cannot physically blend in. Cultural assumptions and idiosyncrasies will not always be caught, creating communication faux pas and awkward situations. Unless you are moving to an expat neighborhood, or area where expats typically live, you may have a hard time making friends who understand the unique struggles you are facing.

Paperwork: Before moving to any country, proper paperwork and documentation must be submitted. Passports, visas, residence permits, tax forms, and dual citizenship forms may all be needed, depending on the host country and length of stay. If this seems like a lot of work for one person, it is an even more grueling task for expatriating families. Children must have proper immunization records and educational paperwork, in addition to the forms already listed. More information about documentation can be found in the next section.

Unfulfilled Cravings: Depending on the country, it may be very difficult or nearly impossible to find the typical groceries and snacks enjoyed in the U.S. Expats have the ability to ship some of these foods to their new home, but this can become expensive and more difficult to accomplish with perishable items. Some foods, such as fruits, vegetables, and seeds, may be illegal to bring into a new country.

Types of Expatriate Assignments

While the previous sections discussed expatriation in general, expatriate assignments from companies can be broken down into four main types: short-term assignments, long-term assignments, home commuters, and

frequent flyers.

Short-term Assignments: These assignments typically last three months to one year, and families do not move with the expatriated worker. Sometimes, home allowances are given to ensure the expat can come back to visit any family staying in the U.S., but there is no need to uproot the entire family for such a short assignment.

Long-term Assignments: Long-term assignments usually last three to five years and are the most traditional form of overseas placement. Extra funds are given to ensure the expat's immediate family can relocate overseas with him or her, if necessary.

Home Commuters: This type of expatriation is when an individual lives in one country during the week, but travels home for the week-ends. Home commuter assignments are less common in the U.S., unless the expatriate lives in a state closely bordering Canada or Mexico, since it would be very time consuming and costly to use this type of assignment for expats working in Europe or Asia. This expat assignment allows the worker to have a better work-life balance, but this is usually not a long-term option.

Frequent Flyers: The last type of expatriate assignment is the frequent flyer. These expats make regular, extended business trips overseas, while working remotely from their home country. For example, a worker in the U.S. may travel to Germany for one to two weeks every other month. While in the U.S., the worker remotely works with individuals at the German location. This type of assignment requires extreme flexibility, as virtual meetings and phone calls may have to be made across different time zones. Work-life balance may be difficult, but it does not require as much of an upheaval for families.⁵

Each type of assignment has unique advantages and considerations. Short-term and long-term assignments require the expat to immerse themselves in the host country's culture, while home commuters and frequent flyers are only in the culture for brief periods of time. Different documentation may be needed as well, since the first two types of assignments require the expat to live in the country, while the last two types may document the expat as a visitor and not a resident.

Endnotes

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Figure 1.1: Statues in Frankfurt

Documentation

Section Overview:

- Explanation of documentation requirements for stays less than and more than 90 days
- Special considerations available for visa requirements
- How permits are issued
- European Union Blue Card
- Explanation of how to apply and the costs associated with applying

Introduction

When an individual decides to move to a new country, they often cannot simply pack up their things, buy a plane ticket, and hit the skies. Documentation must be applied for before the move to ensure the expat can legally live in the new country for an extended period of time. Each country has a different application timeline and different papers the expat will need. The following steps will outline the documentation process for Germany, but information about any country can be found by visiting the country's government website.

Less Than 90 Days

Germany does not require a visa for tourists or business trips lasting less than 90 days. However, the visitor must have a valid passport with an expiration date at least three months after the expected return date.¹

More Than 90 Days

If you are not from the European Union, a residence permit (*Der Aufenthaltstitel*) must be obtained to legally work in Germany.² Residence permits are given for the purpose of general employment, but they are typically only offered when a worker from the EU cannot be found to fill the position. In order to be considered for a residence permit, the

worker must be able to provide an employment contract or some other form of a firm job offer. Residence permits are typically granted for one year and can be renewed annually, as long as the employment situation does not change. After living in Germany for five years on a residence permit, a settlement permit can be applied for in order to stay indefinitely without having to renew the permit each year.

Special Considerations

In addition to the standard one year residence permit, Germany offers special considerations for university graduates, highly skilled workers, and self-employed individuals.

University Graduates. If an individual has received a university degree from a recognized institution and can prove sufficient funds, a 6-month residence permit may be granted without the individual having a firm work offer. This residence permit allows the graduate to search for a job from within the country, but the individual is not allowed to work while conducting the job search. Foreign graduates from German universities are also eligible for this consideration, but are granted 18 months after graduation to find a position, rather than 6 months. After a firm job offer is received, the graduate must apply for a regular residence permit.

Highly Skilled Workers. Individuals who have a firm work offer with a salary of at least EUR 84,600 are eligible to bypass the residence permit and apply directly for a settlement permit. The settlement permit automatically grants the individual indefinite stay in Germany and skips the 5 year waiting period of annual residence permit renewal. Before the settlement permit can be applied for, a specific job offer must be drafted, and permission must be obtained from the Federal Employment Agency.

Self-employed. A special residence permit is offered for self-employed persons wishing to open a business in Germany. This permit is initially valid for three years, with a possible extension if the business is successful. However, the process to obtain this type of permit is extremely rigorous. The business owner must have proof that the new business will provide a need in Germany, benefit the country economically, and be fully financed by a loan or personal capital. This proof is typically outlined in a thorough and detailed business plan, listing personal expe-

rience and describing how that experience will contribute to innovation.

How Are Permits Issued?

Before 2011, people staying for more than 91 days in Germany had to apply for a paper residence permit and permission to work while in the country. Near the end of 2011, the country switched from paper permits to an electronic residence title (eAT, *elektronischer Aufenthaltstitel*). The eAT comes in the form of a chip card, similar to a credit card, and contains all information relating to residence permits. The card details the length of stay, whether work is permitted, any restrictions, an identification photo of the individual, two digital finger prints, and the individual's Alien Office city of issue. A photo of an eAT card can be seen below in Figure 2.1.



Figure 2.1: Example of an eAT chip card

If moving abroad with a family, each person must be issued his or her own eAT card, including children and infants. Even though only one or two people in the family may be working, it is imperative each person has a valid and unexpired eAT at all times. Old permits, even indefinite settlement permits, must be replaced with the new eAT card system by August 31, 2021.

European Union Blue Card

When Germany switched to the uniform eAT system in 2012, they also started offering the EU Blue Card permit. Any individual with a college

degree and a firm job offer of at least EUR 46,400 can apply for an EU Blue Card. This special permit allows individuals to have automatic residence for 4 years or the duration of the employment contract without having to renew the card annually. People with EU Blue Cards can stay outside of Germany in a non-EU country for 12 months without the card expiring. For example, if an expat needed to move back to the U.S. for an extended period of time to take care of a sick family member, they could easily return to Germany without losing residency status.

Additionally, EU Blue Cards automatically allow immediate family members of card holders to work in the new country without restriction. Instead of each family member applying for the ability to work, spouses and children of expats can start working as soon as they are able to find employment. This is particularly helpful for expat spouses who may not have found employment before moving, but are able to find a job after being in the new country. Permanent residency can also be applied for while living on the EU Blue Card. This is typically granted after living in the country for 33 months, but this may be lowered to 21 months if the card holder can prove B level German language proficiency.

How to Apply and Cost

Permits can be applied for before leaving the US or after arriving in Germany. However, if waiting until after arrival, the first 90 days will be treated as a visitors stay, meaning no employment can be held. While it is safer to apply from the U.S. in case the application is rejected, it is often easier to apply once in Germany. If applying after arrival, a residence permit must be obtained before the 90 day period ends, or else deportation could occur.

Before leaving. Applications for German residence must be filled out in person at the German Embassy in Washington, D.C. or at a German Consulate. These consulates are located in Atlanta, Boston, Chicago, Houston, Los Angeles, Miami, New York, and San Francisco. Each consulate serves specific regions of the U.S., so it is important to check online before heading to any of these locations. Once the application is completed, it must be sent to the Aliens Office (*Ausländeramt*) in Germany that is closest to your intended place of residence. This process typically takes one to three months to complete.

After arrival. After arriving in Germany, applications for residency

have to be made in person at the Aliens Authority Office (*Ausländerbehörde*) closest to the city or town where you will live. It is recommended to make an appointment via email to come in at a specific date and time when applying in a large city, such as Berlin or Munich.

Required Documents. Regardless of whether application is done in the U.S. or in Germany, the same documents and forms are required. Some forms can be printed out in advance from the German Government website. The following items are required:

- ☐ Completed application form (two copies if applying in the U.S.—see Figure 2.2 on page 16)
- ☐ Two passport photographs
- ☐ Valid U.S. passport
- ☐ An Anmeldebestätigung – document from local city hall registering your German address (registering and deregistering must be done any time anyone in Germany moves)
- ☐ Employment contract and letter of intent from future employer
- ☐ Tax returns, bank statements, or other documents proving sufficient funds
- ☐ Proof of health insurance valid in Germany (it does not matter whether it is U.S. health insurance or German, as long as it is accepted by German doctors)
- ☐ Visa application fee
- ☐ Any other documents required by Aliens Office (these will be described in the email setting up your appointment)

Visa Fees. Residence permit fees may be paid before traveling to Germany or after arrival, but they must always be paid in cash. For stays less than one year, the cost is 50 euros per person. Stays of more than one year cost 60 euros per person. Permit fees for children are half of the adult fee, so 25 euros for less than one year and 30 euros for more than one year. These fees do change, so it is important to check with the German Embassy or Consulate to ensure this rate does not differ from what is stated above..


 Auswärtiges Amt		Antrag auf Erteilung eines nationalen Visums Application for a national visa Dieses Antragsformular ist unentgeltlich This application form is free		Foto Bitte nicht aufkleben, nur beilegen Photo Please do not use glue to attach the photo
I. Angaben zum Antragsteller/zur Antragstellerin Information on the applicant				Reserviert für amtliche Eintragungen For official use only
Name (Familienname) Surname		Frühere(r) Familienname(n) Former surname(s)		
Vorname(n) First name(s)		Geburtsdatum (Tag/Monat/Jahr) Date of birth (day/month/year)		
Geburtsort Place of birth		Geburtsland Country of birth		
Derzeitige Staatsangehörigkeit(en) Current nationality (please state all nationalities)		Frühere Staatsangehörigkeit(en) Former nationalities		
Familienstand Marital status: <input type="checkbox"/> ledig single <input type="checkbox"/> verheiratet seit married since _____ <input type="checkbox"/> eingetragene Lebenspartnerschaft seit civil union since _____ <input type="checkbox"/> geschieden seit divorced since _____ <input type="checkbox"/> verwitwet seit widowed since _____		Geschlecht Sex <input type="checkbox"/> männlich male <input type="checkbox"/> weiblich female		
Art des Reisedokuments (genaue Bezeichnung) Type of travel document <input type="checkbox"/> Reisepass Passport <input type="checkbox"/> Dienstpass Official passport <input type="checkbox"/> Diplomatenpass Diplomatic passport				

Figure 2.2: The beginning portion of the German visa application in English

Endnotes

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Compensation

Section Overview:

- Description of compensation philosophies
- Types of allowances added to expatriates' compensation

Introduction

Compensation can be a complicated subject, both at home and abroad. Differences in experience, education, and other considerations can cause compensation to vary from person to person. Expatriate pay can also vary greatly, depending on where the expat is moving and the company's philosophy on expatriate compensation. However, no matter where the expat moves, it is likely the organization will factor in allowances and benefits the employee would unlikely receive at home. It is important to understand these allowances in order to bargain with your employer to receive the compensation packages which makes the most sense for your unique situation.

Compensation Philosophy

When an organization decides to move an employee overseas, they must factor the host country's cost of living into the expatriate's compensation package. It may be more expensive to live in some countries than others. If an organization were to pay the expat the same salary as he or she was making in the U.S., the expat would actually lose money by accepting the international opportunity. However, two separate philosophies exist when determining how to account for this difference in cost of living. Does the organization pay expatriates the amount needed to live the way they do in the U.S., or is the expat given enough money to live like the locals?

Many U.S. citizens live in large, spacious single-family houses, but this is not the case in most other countries. For example, most Germans live in multi-family buildings, such as apartments or duplexes. Wealthy in-

dividuals are the only people who own houses or live in single-family homes. While the organization may raise the expatriate's compensation to ensure they can afford the overall increased housing costs, the company must decide if they will pay the employee enough to afford a single-family home like he or she had in the U.S. Often times, the company will take the host country philosophy, or pay the expat enough to live a comfortable life similar to the locals. However, some organizations which send expats to developing countries decide to take the home country philosophy, or pay the expat to live comfortably and safely in a home similar to what is owned in the U.S.

Types of Allowances

In addition to the base salary received, expatriates often have allowances added to their overall compensation strategy to pay for items, such as housing, relocation, and home leave. The top allowances are listed below with descriptions of what that allowance includes.

Foreign Service Premium. This allowance is given to expatriates as a reward for having the willingness to move abroad, usually when the expatriation of a family is involved. Foreign service premiums are typically given in amount of 10% to 25% of the employee's salary.

Hardship Allowance. This is another form of a foreign service premium given to expats who are sent to live in countries with poor living conditions, vastly different cultures, or poor access to health care.

Cost of Living Allowance. The additional funds received from this allowance permit the expat to maintain the standard of living observed within the U.S.

Housing Allowance. When housing is much more expensive in the new country than it is within the U.S., expats are sometimes given a housing allowance to help offset these costs. However, expats are not sent abroad to live cost-free, so employees should not assume that the organization will cover all living expenses with allowances. Some of the employee's base salary will need to be contributed toward daily expenses.

Furnishing Allowance. Some organizations provide expats with furnishing allowances, which allow the employees to either ship belongings abroad or pay for new furniture once in the country.

Education Allowance. When moving abroad with children, some organizations will supply families with education allowances, so children can attend private schools taught in English. These allowances may cover tuition, books, and/or supplies.

Home Leave Allowances. Even though an expat or expat family is moving abroad, they are not forced to spend the entire assignment in the new country. Often times, expats travel back home on some holidays to visit family. Home leave allowances help expats achieve this work-life balance by providing round-trip business-class airfare once a year for visits back to their home country.¹

Taxes. Depending on the country, expats may be forced to pay excess taxes, which would not be applicable when working within the U.S. Some companies choose to pay these taxes on behalf of the employee. If expatriates choose to terminate their residency within the U.S., the expatriation tax may occur. This amount is often paid for by the employee, as renunciation of citizenship is completely optional and typically only used when an expat does not want to pay taxes every year to the U.S. government, especially if they do not intend of moving home any time soon.²

Endnotes

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Process and Timeline

Section Overview:

- Description of ways to become an expatriate
- How to prepare for moving
- Timeline chart of activities to complete before moving

Introduction

The expatriation process looks different for each individual who decides to move abroad. Some individuals are sent abroad by the company they work for in the U.S., while others expatriate to become a student in a foreign university. Other times, individuals find a job abroad and move on their own. Additionally, some people retire and decide to spend the rest of their lives outside of the U.S. Each of these people will go through a separate and unique expatriation process, but some similar steps must be taken, such as filing documentation paperwork, finding housing, and packing up belongings.

Ways to Become an Expat

There are four main ways to become an expatriate: as a student, as a government employee, for a private employer, or simply packing up and leaving. Special considerations should be taken when contemplating each of these options, as no process is perfect, and they all require preparation. Your financial stability should be considered before picking an expatriation process, because some processes are more risky and less financially stable than others.

As a Student. In Germany, this may be the easiest and most cost-effective way to become an expatriate. If currently attending a university in the U.S., study abroad programs and international programs can usually be discovered through the admissions or study abroad offices. Otherwise, it is possible to apply as an international student directly to German universities, especially if you have a proficient understanding

of the German language.¹ These methods typically make the documentation process fairly easy, but many students are not allowed to work while studying in the country.

As of October 2014, public German universities became tuition-free to all German citizens and international students. Previously to 2014, most German universities did not charge tuition fees, but the government decided to allow fees in 2006. However, many schools only charged low amounts, if any fees at all. Because of this, the German government decided to switch back to the fee free system for all public institutions. Many private universities still charge tuition fees, but these are typically minimal compared to tuition rates in the U.S.²

For the Government. If working for the U.S. Federal government, it is possible to be sent abroad for a variety of reasons. Military personnel may be sent to a country for temporary duty. Additionally, U.S. citizens can become U.S. diplomats by taking a rigorous oral and written test. After becoming a U.S. diplomat, individuals are typically given a two year assignment overseas in a country chosen by the government. Using this process to become an expatriate may take additional time, but documentation would be easy to obtain.

For a Private Employer. Individuals who are sent overseas by their current employer or who find a job on their own at a private company in the host country are both considered to be expats for private employers, but the two processes look very different. Individuals who are transferred abroad typically have large amounts of help from a team of HR professionals dedicated to making the expat process successful. Documentation is filed by the company, and housing is often set up before the move.

Alternatively, individuals who embark on the foreign job hunt alone must file documentation directly with the government and communicate with potential employers without assistance. While this option may be more difficult, it is completely possible, especially with the help of online job search engines. People looking to apply directly to a foreign organization must take the application process into consideration, as Europe does not use a resume for applications. A CV must be created, which is a more personal type of resume. Applicants are expected to include if they are married, their age, and a professional picture. The CV is strictly chronological and focuses on education more than experi-

ence. Unlike the traditional resume, a CV is less of a self-marketing tool and more of an autobiography.

Pack Up and Leave. Since Germany allows individuals to visit the country for 90 days without a visa, it is possible to come to the country to look for work, rather than finding a position while still in the U.S. This process is for the adventurous and risk-friendly expat. Without a stable job offer, it is not guaranteed that you will be able to find a position once you arrive and may have to return home after the 90 days is completed. This option may be most feasible for financially stable individuals and is not recommended for expatriating families.

After arriving in Germany, it may be possible to find local resources who are willing to help you locate an employer, as well as anything else you may need. This may also be helpful for trailing spouses who move abroad with an expatriating husband or wife. Some local individuals are willing to tutor expats on the local language, set up utility information, find local employment, or any other needs the expat may have.

How to Prepare for Moving

Even though each person experiences the expat process differently, some similar steps can be taken by all expats to help ensure a smooth transition to the new country. The following checklist outlines activities which should be completed 90 days, 60 days, and 30 days before moving, as well as things to complete on moving day.³

90 Days Before

- ☐ Book tickets and hotels
- ☐ Inform children's schools of move and ask for transfer certificates
- ☐ Check quarantine requirements for pets
- ☐ Research moving companies
- ☐ Create folder with hard copies of paperwork
- ☐ Make checklist of packing boxes
- ☐ Create tax and finance folder
- ☐ Ensure passports are valid
- ☐ Receive vaccines for family and pets

- ☐ Print address cards
- ☐ Search for tenants to rent out house OR put it up for sale
- ☐ Pack items not needed within the next three months

60 Days Before

- ☐ Ask doctors and vets for medical records
- ☐ Sell car and/or household equipment and appliances
- ☐ Check insurance policies and arrange visas
- ☐ Set up mail re-routing service
- ☐ Prepare a power of attorney
- ☐ Discuss upcoming move with the bank
- ☐ Find local names for any prescriptions and get proof of need
- ☐ Set up internet banking
- ☐ Have a garage sale
- ☐ Cancel subscriptions and regular deliveries

30 Days Before

- ☐ Change address on important documents
- ☐ Pay outstanding bills
- ☐ Discontinue utilities
- ☐ Start to pack house
- ☐ Make sure essential people have forwarding address

Moving Day

- ☐ Get a rough delivery date for shipped items
- ☐ Make sure nothing is left behind in the house
- ☐ Say final goodbyes
- ☐ Make sure essentials are in suitcase

Endnotes

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Figure 4.1: Castle overlook in Heidelberg

Housing and Service Providers

Section Overview:

- Explanation of how to search for housing
- German housing terminology
- Comparison of renting versus buying
- Description of how to pay rent and set up utilities

Introduction

One of the first big steps for expatriates to overcome after deciding to move abroad is finding housing in the new country. For many expats, it makes the most sense to rent a house or apartment, but some individuals do decide to buy a home. Renting is the most popular option in Germany for expats and locals alike. Germany is a great country to find a house, as plenty of housing options exist for fairly reasonable prices.

The closer individuals in Germany live to the city center, the more they will pay for their home.¹ Within cities, studio apartments and flats are the most popular housing type, while cottages, large family homes, and iconic German fachwerk houses, pictured to the right, are available in suburbs outside the city. It is important to keep transportation in mind while house searching, but public transportation is typically available even in more rural German suburbs.



Figure 5.1: Iconic German fachwerk building in Frankfurt

A great deal of pride is placed in the German home. Even though Germans typically keep conversations formal, the home is a safe place to be yourself and show individualism. Homes are almost always kept clean and tidy, and it is expected that individuals living in flats or with sidewalks in front of their homes will

keep all common areas clean, including pavement areas, corridors, steps, and stairwells. Only close friends and relatives and usually invited to the home, so do not be offended if a coworker or acquaintance insists on getting together in a public area, rather than at someone's home.²

How to Search

Germans search for homes in three different ways: in newspapers, through online housing sites, and with the help of an estate agent. Newspapers are slightly impractical for expatriates, as they may not have access to many local newspapers while house searching from the U.S. This option also puts the searcher at a disadvantage, because it is unlikely that the home will still be available by the time the landlord or owner can be contacted. Estate agents are sometimes used and can be a very reliable source for housing information, but this option is very expensive and usually requires the payment of estate agent fees.

The most popular way to house search is through online housing sites. A popular website used by expats in Germany is "Immonet.de". This is Germany's largest housing portal, with over 950,000 properties listed.³ This site not only lists properties for sale, but rental properties as well. Additionally, the website can easily be translated to English for use by expatriates and students coming to live or study in Germany. Immonet.de also offers a mobile app, where expats already in Germany can walk around a particular neighborhood and see which houses and flats in the area are for rent.

German Housing Terminology

Before starting the home searching process, it is important to understand common German housing terminology. In the U.S., many homes are listed by the number of bedrooms and bathrooms they have. This is not the process used in Germany, as bathrooms, kitchens, and halls are not included in the count. Instead, homes are listed by how many rooms they have, only including bedrooms, dining rooms, and living rooms. For example, a home with two bedrooms, a living room, and a dining room would be called a *vier Zimmer*, or a four room home.⁴ An example floorplan of a vier Zimmer flat can be found in Figure 5.2.

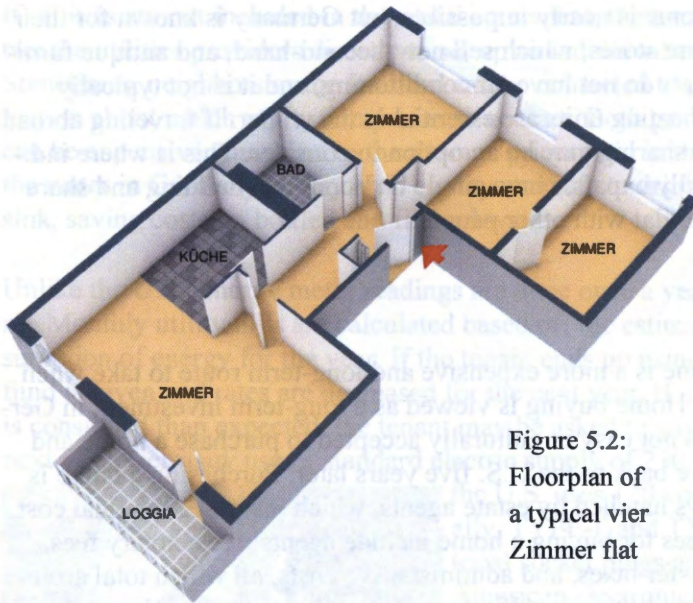


Figure 5.2:
Floorplan of
a typical vier
Zimmer flat

When looking for rental homes, it is important to know the difference between a *Kaltmiete* and a *Warmmiete* contract. *Kaltmiete* literally translates to “cold rental fee”, meaning utilities are not included. *Warmmiete* translates to “warm rental fee, meaning utilities are included.”⁵ Utilities and utility setup will be discussed with paying rent later in this section.

Renting

Since housing rental is very common in Germany, rental costs are not too expensive, but housing prices do increase significantly near larger cities, such as Berlin, Frankfurt, and Munich. Houses and flats in outlying suburbs will provide more space and privacy for lower prices. After locating a home of interest, a viewing (*bezeichnung*) is scheduled to see the home. It is not uncommon for landlords to have 20 potential tenants view the home at the same time, so interest must be expressed quickly when finding a location you enjoy.

German flats are usually comfortable, but particularly small and unfurnished. The word “unfurnished” may cause panic, as shipping furniture

to the new home is nearly impossible, but Germany is known for their many furniture stores, which sell new, second-hand, and antique furniture. Most flats do not have air conditioning, and it is not typically needed, but heating units are essential in the winter. If traveling abroad alone, house sharing may be an option to consider. This is where individuals, usually expats, rent a single bedroom in a building and share the rest of the flat with other people.

Buying

Buying a home is a more expensive and long-term route to take when expatriating. Home buying is viewed as a long-term investment in Germany, so it is not easy or culturally accepted to purchase a home and sell it to move back to the U.S. five years later. Purchasing a home is almost always handled by estate agents, which increases the final cost. Additional fees for buying a home include agents' fees, notary fees, property transfer taxes, and administrative costs, all which total around 10% of the purchase price. If you are intending to stay in Germany on assignment for more than 10 years, buying a home may be advised; otherwise, it is safer and more cost effective to rent.

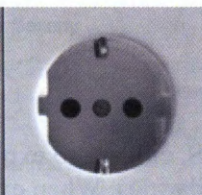
Paying Rent and Other Utilities

When renting a flat or home, three months' rent is usually taken upfront as a security deposit. However, this deposit is paid back with interest when the tenant moves out, as long as the area is left in good condition. In Germany, many parts of the landlord-tenant relationship are codified in city laws, so the lease may not note anything regarding notice periods, renovations, or actions in the event of non-payment. Rent, however, will always be stated.

Rent in Germany is sometimes paid in two parts: the actual rent, which is a fixed amount, and the *Umlagen*, which may vary monthly depending on property taxes, stairwell cleanings, trash collection, and water usage. The *Umlagen* is typically used in addition to a *Kaltmiete* contract. If a *Warmmiete* contract is used, these additional costs will be covered in the fixed amount. Gas, used for both heat and cooking, may be included in the fixed costs, but electricity is almost always paid for by the tenant.

If utilities are not included in the rental agreement, the tenant must contact the utilities providers directly to set up an individual contract. Sometimes, neighbors or the landlord can be contacted to provide information about which utility companies to contact. Both gas and electric can be expensive compared to the average prices paid in the U.S., but the water in Germany is very high quality and safe to drink out of the sink, saving costs on bottled and filtered water.

Unlike the U.S., energy meter readings are done once a year in Germany. Monthly utility bills are calculated based off the estimated consumption of energy for the year. If the tenant ends up using less, a refund is given and rates are decreased for the next year. If more energy is consumed than expected, the tenant may be asked to pay more the next year. Germany uses a standard electric supply of 230 volts, while



the U.S. uses 120 volts. Additionally, TYPE-F and TYPE-C electrical socket plugs are used, so American electronics will need an adequate adapter.

Figure 5.3: TYPE-F socket and plug

Endnotes

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German Culture

Section Overview:

- Regional information and cultural attributes
- Business etiquette
- Celebrated holidays and gift-giving
- Dining and traditional meals
- Hofstede Centre Comparison to the U.S.

Introduction

Germany is a great country for U.S. citizens to expatriate to, as the two country's cultures have many similarities. When examining geography, politics, and economies, Germany is at the center of Europe for all three areas. The country is the second most populous country in Europe, after Russia, and the German economy is the largest on the continent. The standard of living in Germany is very high, and Americans planning to move there will not have to give up many modern comforts. Germany has a very distinct culture, especially in regards to communication and dining, so it is important to take these cultural aspects into consideration before moving abroad.

Regional Information

Germany is located in Central Europe, bordering Austria, Belgium, Czech Republic, Denmark, France, Luxembourg, Netherlands, Poland, and Switzerland. The capital of Germany is Berlin, and nearly 83 million people live in the country. Around 91.5 percent of these people are German. 2.4 percent are Turkish, and the remaining population is a mix of different ethnicities. As expected, Germany's official language is German, but many individuals in the country also speak English. The majority of Germany's population identifies as Protestant (34%) or Catholic (34%), with the rest of the population unaffiliated with any religion.¹

Germany



Figure 6.1: Map of Germany

Cultural Attributes

Germans are known for placing a high priority on structure, privacy, and punctuality. Additionally, thriftiness, hard work, and industriousness are valued. It is highly unusual for Germans to discuss their personal life at work or make an impromptu decision without thinking through the possible consequences. According to Live Science, "Germans are most comfortable when they can organize and compartmentalize their world into controllable units."² If an appointment is made, it will very rarely be cancelled. On the other hand, you will be seen as unprofessional, unorganized, or rude if you ask to cancel an appointment or meeting.

Planning is a priority in Germany, and forward thinking is essential. Careful planning is viewed as providing security for any situation. Germans believe a proper time exists for every activity, so work and personal lives should be rigidly divided. This world view may be seen as cold or unfriendly by some Americans. Additionally, Germans rarely hand out compliments or publicly admit to faults. Americans may find this frustrating or standoffish, but expats must learn to not take this behavior personally.

Business Etiquette

The seemingly ridged German culture carries over heavily into the business world. Formal greetings should be initiated with a quick, firm handshake, and formal titles should always be used to show respect. As with daily life, all aspects of business are carefully planned and scheduled. Formal communication should always be used, as Germans easily become suspicious of hyperbole, promises that are too good to be true, and displays of emotion. Germans also primarily rely on direct and blunt written communication in the workplace.

Unlike many U.S. companies, German companies tend to be headed by technical experts, rather than lawyers or financial individuals. Engineers are highly regarded, and workers are judged more by their competence and diligence than their interpersonal skills. Personal relationships are not needed to do business with others, and individuals with exceptional speaking skills will not be taken seriously if they do not have the technical skills or education as well.

Similar to the U.S., professional business attire is worn in most business settings, especially meetings and interviews. Professional business attire is typically understated, formal, and conservative. Men should wear dark colored, conservative suits. Similarly, women should wear a business suit or a conservative dress. Large or overstated jewelry or accessories will be viewed as distracting and unprofessional.

Holidays and Gifts

Since the majority of Germans are Christians, many of the traditional Christian holidays are celebrated, including Easter and Christmas. However, only one federal holiday exists. German Unification Day, the only federal holiday, is celebrated on October 3rd each year and marks the reuniting of East and West Germany. Oktoberfest, while not a federal holiday, is another largely celebrated tradition in Germany. This festival starts on a Saturday each year in September and lasts for 16 to



Figure 6.2: Inside of a tent during Oktoberfest

18 days. Oktoberfest originated in 1810 to celebrate the wedding of a Bavarian Prince.

Any time a gift is given in Germany, whether for a holiday or as a gift when visiting a friend's home, cultural customs should be observed. When visiting the home of a friend or relative, always bring a small gift, such as chocolate or flowers. Yellow roses or tea roses are the best flowers to give, as red roses are viewed as being romantic, while carnations are usually sent when mourning the loss of a loved one. If bringing wine as a gift, it should always be imported from France or Italy. Giving wine from Germany insinuates that the host will not have good wine at their home.

Dining and Food

When invited to a dinner party or business meeting where dining will be involved, guests should always arrive on time and never early or late. If it is anticipated that you will be more than 15 minutes late, the host should be notified with a phone call. Additionally, handwritten thank you notes should always be sent to the host the next day.

Formal table manners in Germany are very similar to the U.S. Guests should remain standing until invited to sit by the host. No utensils should be touched until the hostess places the napkin in her lap. Elbows are kept off the table, and as much food as possible should be cleaned off the plate to show gratitude. Unlike the U.S., Germans use continental table manners, meaning the fork is always held in the left hand, and the knife is always held in the right hand. Neither of these utensils are set down nor change hands while eating. If food can be cut with the fork rather than the knife, it is more than acceptable to use the fork as a cutting utensil.

Authentic German food is rich and hearty, but traditional meals vary by region. Pork, as well as other meats, is heavily consumed. Potatoes and sauerkraut are also very traditional sides for German dishes. Bratwurst and currywurst, hot pork sausage cut into slices and seasoned with curry sauce, are traditional meat dishes, while Kartoffelsalat, or potato salad, is often eaten as a side dish.³ Beer is the most popular beverage throughout all of Germany, and the country is known as the birthplace for Pilsner, Weizenbier, and Alt. Most importantly, never, ever drink your beer without toasting with a “Prost!”



Figure 6.3: Two traditional German meals

Hofstede Centre Comparison to U.S.

The Hofstede Centre compares countries based on six main areas: power distance, individualism, masculinity, uncertainty avoidance, long term orientation, and indulgence. By examining these six main areas, individuals are able to get a clear picture of what traits their host country values compared to their home country. The comparison chart generated by the Hofstede Centre can be found on page 36.⁴

Power Distance. This refers to the extent to which less powerful members of organizations expect and accept that power is distributed unequally. German leadership is highly decentralized, and the country is supported by a strong middle class. Control is disliked, and leadership is challenged if individuals are not leading because they possess expertise. However, if an individual is an expert in a specific area, the power relationship is accepted. The U.S. scores slightly above Germany in this area, but not enough to make a large difference.

Individualism. This area focuses on the degree of interdependence a society maintains among its members. In other words, it measures whether the country has a self-image based on "I" or "We". Germany is considered an individualist society, but less so than the U.S., where people cling to the concept of individuality. The German society has a strong belief in self-actualization, and small families are focused on more than extended family units. As expected, the U.S. scores quite higher on the individualism scale than Germany.

Masculinity. It is important to understand what drives a group of people. Are they driven by competition and success or caring for others and quality of life? This is exactly what the masculinity score aims to capture. A high score in this area means the country is achievement driven, while a low score indicates putting others first. Germany and the U.S. are both placed in the middle range, with Germany scoring slightly higher than the U.S. Individuals in Germany live in order to work and draw much of their self-esteem from the tasks they perform. Performance is highly stressed and required early in school to differentiate which type of school each student will go to.

Uncertainty Avoidance. As expected, this area measures how much a society deals with the fact that the future can never be certain. A high score indicates that the society tries to control the future, while a socie-

ty with a lower score just lets the future take place without planning. Since Germans are known for structure and strict planning, they score fairly high in this area, while the U.S. measures slightly lower. Germans prefer to compensate for uncertainty by relying on expertise.

Long Term Orientation. This area measures how a society maintains links to its past while dealing with present and future challenges. Due to World War II, Germans tend to put much consideration on past events to prevent those events from happening in the future. Traditions are adapted to changing conditions, and perseverance is exhibited to achieve results. Compared to Germany, the U.S. is ranked very low in this area, while the Germany culture scores fairly high.

Indulgence. The extent to which people attempt to control their impulses is measured by the indulgence score. Restrained societies with lower indulgence scores, such as Germany, do not put a strong emphasis on leisure time, while higher scoring societies, like the U.S., believe that indulging in desires and impulses is acceptable. Germans believe their actions are restrained by social norms and that indulgence is somewhat improper.

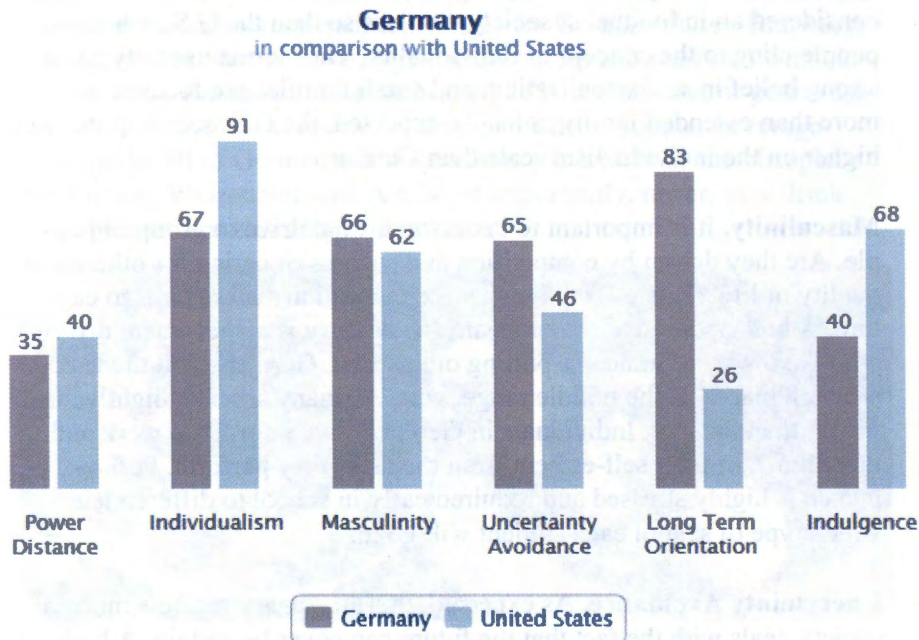


Figure 6.4: Comparison chart generated by the Hofstede Centre

Endnotes

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Figure 6.5: Political artist in Stuttgart

German Language

Section Overview:

- Introduction to German language
- Utilizing technology to learn
- Quick list of common words and phrases

Introduction

German is often considered a difficult language, due to its long and winding words; however, many German terms are similar to English, such as cat and Katze. Approximately 64% of the German population speaks English, but it is always a good rule of thumb to learn at least the language basics of any country before you live there long-term.¹

Learning German will not only allow you to communicate in Germany, but multiple other countries as well, since it is the official language of Austria and Liechtenstein and one of the official languages of Switzerland and Luxembourg.²

Utilizing Technology

Many different options exist for learning new languages, from taking classes to utilizing technology. Simply searching “how to learn German” on Google will populate websites with lists of common words and phrases. Programs such as Rosetta Stone can be purchased to gain an in-depth knowledge of the language, but this option may be somewhat pricy. A great website and phone application for learning new languages for free is Duolingo. This app utilizes gamification to teach users any language they choose. Users read, listen, and speak the language to unlock new word categories and ensure their progress meters stay filled. Duolingo is currently available on iOS and Android, as well online at [duolingo.com](https://www.duolingo.com).³ While the website is more interactive and has more ways to learn, the app is a great way to squeeze in learning while on the go.

The following are common words and phrases to help you get started on your journey to learning German.⁴

Common Words	
English	German
Yes	Ja
No	Nein
Please	Bitte
Thank you	Danke
You're welcome	Bitte schön
Excuse me	Entschuldigen
German	Deutsch
Good	Gut
Bad	Schlecht

You, Me, We, and They	
English	German
I	Ich
We	Wir
You (familiar)	Du
You (formal)	Sie
You (plural)	Ihr
They	Sie

Greetings	
English	German
Hello	Hallo
Goodbye	Auf Wiedersehen
Good morning	Guten Morgen
Good afternoon	Guten Tag
Good evening	Guten Abend
Good night	Guten Nacht

Numbers	
English	German
Zero	Null
One	Eins
Two	Zwei
Three	Drei
Four	Vier
Five	Fünf
Six	Sechs
Seven	Sieben
Eight	Acht
Nine	Neun
Ten	Zehn

German Language

Questions	
English	German
Do you speak English?	Sprechen Sie Englisch?
How are you?	Wie geht's?
Where is the bathroom?	Wo ist die Toilette?
What is this?	Was ist das?
Do you have...?	Haben Sie...?
Where is...?	Wo ist...?
What time is it?	Wie spät ist es?

Places	
English	German
Train (Subway)	die Bahn
Main Train Station	Hauptbahnhof
Hotel	das Hotel
Post Office	die Post
Bank	die Bank
Police Station	Polizewache
Hospital	das Krankenhaus
Pharmacy	die Apotheke
Store	das Geschäft
School	die Schule
Church	die Kirche
Street	die Straße

Days	
English	German
Day	der Tag
Week	die Woche
Month	der Monat
Year	das Jahr
Monday	Montag
Tuesday	Dienstag
Wednesday	Mittwoch
Thursday	Donnerstag
Friday	Freitag
Saturday	Samstag
Sunday	Sonntag

Endnotes

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Figure 7.1: Attractions at Munich Frühlingsfest 2014

Packing and Shipping

Section Overview:

- Considerations to think through before packing
- Best ways to ship items
- International moving insurance

Introduction

After accepting a position abroad and filling out the necessarily documentation, a new struggle begins: deciding what to pack. Obviously, it is nearly impossible to bring every possession to the new country. On the other hand, it is entirely too expensive to leave all belongings behind in order to buy everything new in the host country. Some considerations must be made before beginning the packing process.¹

Considerations

Where will you live? It is extremely rare that expats move immediately from their home country into a house in the host country. A transition period typically occurs where the expats are living in a hotel or temporary housing until a “permanent” home can be established. This may make a difference in what is packed, as this temporary housing is typically small and causes expats to live out of suitcases.

Delay in Receiving Belongings: If items are shipped in the mail, it may take additional time to receive them. Important, essential items should always be taken on the plane to ensure they arrive at the same time you do. It may also be smart to pack items which will help younger family members with the transition, such as a special stuffed animal, blanket, or toy.

Luggage Requirements: All airlines have different luggage requirements, so it is important to check the requirements specific to your airline. Some airlines allow two suitcases per passenger, while others only

allow one. Weight limits also vary per airline. It may also be a good idea to check the list of prohibited items which cannot be taken onto planes.

Weather and Clothing: The weather in your host country may be quite different than what you are used to back home. Germany typically has a temperate and marine climate, similar to the Midwest in the States. The weather can sometimes be unpredictable, so appropriate clothing should be brought on the plane. Additionally, due to the wide variety of body types in the U.S., some individuals may have difficulty finding clothing in some countries.² This should not be a problem in Germany, but it may be more difficult to find clothing in Asian countries where body types are typically more slender. A good rule of thumb to use is if you often wear it in the States, it does not hurt to pack it to wear abroad.

A good way to decide if an item should be brought is to make two lists, one of essential items and one of useful items. Essential items should include things which cannot be left behind, such as documentation, clothing, and health supplies. Useful items should include objects like small electronics, toys, snacks, and books. The following are some recommended items to get you started.

Recommended Essentials

- ☐ Documents (airline, passports, visas, license, pocket dictionary, immunization records, medical history, extra passport photos, credit cards, currency, health insurance)
- ☐ Clothing
- ☐ Toiletries
- ☐ Health supplies
- ☐ Baby and toddler needs

Recommended Useful Items

- ☐ Laptop and accessories
- ☐ Camera and chargers
- ☐ Converters and adapters

- ☐ iPod
- ☐ Toys and coloring books
- ☐ Food and snacks
- ☐ Books

Shipping

If items are not packed in luggage to be taken on the plane, they can be shipped to arrive at your new home. This may be beneficial if the items are not needed immediately or if it is going to take a few weeks before you are able to move from temporary to permanent housing. Shipping items internationally can sometimes be expensive, just like paying for additional checked baggage at the airport, so it is important to check the prices of different shipping and mailing options before making a final decision.

Shipping items internationally typically takes longer periods of time than packages mailed domestically, and international packages are put through more rigorous travel, as they may be moved to and from multiple planes or ships. Items may get broken or misplaced, which is an additional stress no expatriate wants to deal with. Purchasing international moving insurance can help ensure monetary hardships are kept to a minimum throughout the moving process.

International moving insurance, also known as marine cargo insurance, helps remedy any physical damage or loss of goods when they are being transported by sea, land, or air. If you are using an international moving company to help pack your items securely, insurance can typically be bought directly through the moving company. Additionally, moving insurance can be purchased from an insurance company or marine insurance broker. If being sent abroad by an employer, insurance may already be included in the list of items being paid for by the company, but it is always a good idea to ensure this insurance adequately covers the items you are bringing. Insurance companies tend to utilize similar insurance covers and terms, but they may vary from firm to firm.³

Before packing anything, it is imperative to make a detailed inventory of all items being moved. This helps ensure that any lost items can be accounted for, especially if you purchase insurance. It is recommended

to include serial numbers and similar identifying information when shipping any electronic objects. Once the inventory has been created, items can be packed securely in labeled and color coded boxes. Valuable items should be packed professionally to ensure safe arrival.⁴

While it is ultimately up to you to decide what belongings you want to take, logistically, it is not feasible or reasonable to bring certain items. Shipping furniture is very expensive, and the size of most American furnishings will not fit appropriately in international dwellings. Additionally, it may not make sense to bring electronic equipment and appliances, as adapters will likely be needed. Hair dryers and other small appliances can easily be purchased in the new country. Vehicles are very expensive to ship, and if moving to a city, it is likely that public transportation will be sufficient for traveling most places. Furthermore, vehicles and some electronics require the payment of customs fees in order to bring the items into a new country.

Endnotes

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Expatriation with Families

Section Overview:

- Needs of the trailing spouse
- Challenges children face when expatriating
- Expatriation requirements when moving with pets

Introduction

Moving to a new country alone is difficult, but moving to a new country with a spouse, children, and/or pets is even more challenging. In a 2011 study, the top family challenges for expat assignments were partner resistance, family adjustment, children's education, and location difficulties.¹ For short assignments, companies typically will not pay to relocate the entire family, but longer assignments often involve the entire family moving to the new country. Even though much of this process is paid for by the organization, nonmonetary stress still occurs.

Spouses

When an individual is offered a long-term expatriate assignment, a trailing spouse situation is often created. Trailing spouses are the husbands or wives of expatriates who do not have an employment situation lined up in the new country. These individuals often have to leave their current careers in the U.S. to move with the expatriating spouse, causing feelings of loss and vulnerability. Sometimes organizations may be willing to help find new positions for the trailing spouse, or the spouse's company may be willing to allow him or her to work remotely from the new country.²

Trailing spouses have unique emotional needs. While expatriates may be excited about the new career opportunities and advancement within their current organizations, spouses may be anxious or frustrated about giving up their jobs and transitioning to a new culture. Working expatriates may experience culture shock more slowly than spouses, since ex-

expats are spending the majority of the day working, while spouses are focused solely on adjusting to their environment. This can create misunderstanding and frustration in the home.

If finding a job is not an option or not desirable, expat spouses should get involved with local organizations and clubs instead. Meeting locals and other expatriates in the area will help with the transition into the new culture. Spouses who have someone to meet with on a weekly basis when first arriving are more likely to have a successful experience. A lack of language fluency can also create feelings of isolation, so both the expat and the spouse should be involved in pre-assignment training. Finally, it is not unusual to ask the company for annual home leave to return home and visit relatives. If this is not initially offered, be sure to ask if this option is available.

Children

Moving abroad can be a great experience for children, as they become more culturally open-minded and knowledgeable, as well as more adaptable. Children who grow up in an expat environment often become bilingual and can easily communicate with people from other cultures. However, some children can develop expat child syndrome and view the experience negatively. Children experiencing expat child syndrome typically exhibit the following signs:

- Uncooperative or disruptive behavior
- Arguing with siblings
- Development of unusual eating habits
- Rose-tinted attachment to home country
- Refusal to acknowledge host countries unique offerings³

Expat children often have a harder time adjusting to the new environment than adults. Leaving behind friends and a familiar school is difficult, and children need to be adequately prepared before making the transition. Researching the new country as a family before moving is a great way to get children involved in the process. Be sure to allow children to pack items which are important to them, such as a favorite book, stuffed animal, or blanket. This will give the child a sense of stability when making the difficult transition. A few concerns should be consid-

ered before deciding to move children abroad:

Age. Younger children are more adaptable to moving to a new culture, while older children may be reluctant to leave the school and friends they have known for years. It is important to get input from older children to see how they feel about the move. If children are close to graduating from high school, it may be possible to allow the teen to stay with relatives and finish their high school career, rather than forcing them to spend their last 6 months of school in another country.

Education. Children over the age of six will likely need to be enrolled in school in the new country, unless homeschooling plans exist. The decision will have to be made whether to send children to local German schools or to an international school with other expat children. Local schools may help with integration, but international school may make children feel more comfortable.

Health and Safety. It is important to consider the healthcare and sanitation of the host country. Some countries may not have easy access to clean drinking water, quality food, or low pollution. Additionally, some countries may have high crime rates and racial intolerance. Germany is a very safe country with similar access to clean water and healthcare as the U.S., so moving to this country should not raise many health or safety concerns.

Pets

When discussing expatriation with families, pets are often left out of the picture, but they pose a huge decision: will the family pet travel to the new home or be left in the U.S.? Obviously, small pets such as fish, hamsters, and reptiles will not easily travel on planes and should be rehomed in the U.S. before moving. Common pets taken to host countries on expatriate assignments are dogs, cats, and ferrets.

If you decide to leave your furry friend in the U.S., taking him or her to an animal shelter is not the only option. Often times, talking with friends or relatives will reveal other opportunities to rehome your pet. Friends may be willing to keep the pet until you settle in to the new culture. After the initial moving stress has settled, your pet can be sent to you. Another option is to have a friend adopt the pet. This way, you know the animal is going to a good home. The final option is to have a

relative care for your pet until you return. This option is best if the assignment will end within 18 months. If the decision is made to leave the pet behind, it is important to drop the animal off wherever it will be staying days before you leave. Additionally, leaving an unwashed shirt with the animal may help with separation anxiety.⁴

Germans have strict rules when it comes to owning pets, most of which pertain to dog ownership. Pets are highly valued in the German culture, and pet ownership is taken very seriously. All animals must be microchipped and have a pet passport, as mandated by the EU. Pet passports can be obtained from a veterinary practitioner and contain the name and address of owner, description of animal, microchip number, all relevant rabies information, and the address and signature of the vet. Additionally, owners of pets being sent by plane must provide a written declaration that the animal is not intended for sale.⁵

Dogs and cats younger than 15 weeks old cannot be brought into Germany. This is primarily because all dogs must have a rabies vaccination 21 days prior to travel, and puppies cannot be vaccinated until 12 weeks old. Dog owners may be asked to obtain personal liability insurance, in case the animal injures another person or pet. Bull terriers, pit-bull terriers, Staffordshire bull terriers, or any crossbreed of these dogs are strictly prohibited in the country. All dogs must be licensed for an annual fee, but cat owners do not have to obtain this license.

Endnotes

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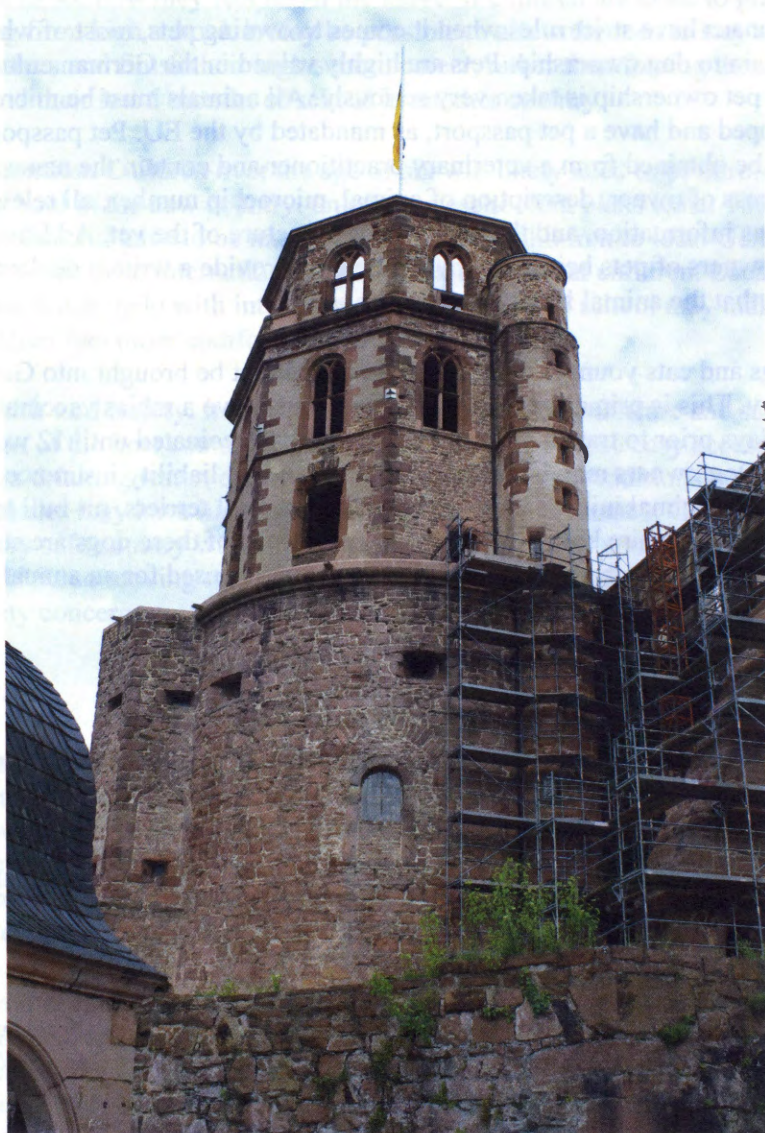


Figure 9.1: Part of a castle in Heidelberg

Repatriation

Section Overview:

- Concerns to ponder before repatriating

Introduction

Just as preparations have to be made to move abroad, many considerations must be made when repatriating back to the U.S. as well. Often times, people believe that it is easy and simple to move back home, but this is hardly the case. After living in a new country and acclimating to a new culture for years, trying to reconnect to the U.S. culture can be difficult. Four main concerns must be taken into account when going through the repatriation process.

Main Concerns

Emotional Concerns. Many repatriates experience culture shock as they adjust to their previous lifestyle. Moving anywhere, whether it be to a new place or a familiar place, can be stressful. Additionally, many individuals expect their home countries to be the same as when they left, but the worldviews gained from living abroad will cause repatriates to see everyday tasks differently. Family members and friends have grown and changed, and they may not fully appreciate the experiences discussed by repatriates.¹

Practical Concerns. The same practical matters which had to be handled to move abroad must once again be prearranged to move back home. Personal belongings, as well as items collected from the years abroad, must be packed and shipped. Small pets purchased while abroad may need to be relocated with neighbors or friends, while dogs and cats may need additional vaccines to be sent back to the U.S. Schools and workplaces must be reestablished for children and spouses. Additionally, if the family home was sold before moving, a new home may need to be purchased. All of these concerns require research and planning to ensure a successful transition.

Financial Concerns. When expatriates move abroad, they often change

their tax status to "non-resident" for easier tax reporting. Once back in the States, this status will need to be changed again, which typically means filling out more paperwork. Upon returning to the U.S., it may be difficult for repatriates to establish credit or apply for a mortgage. Additionally, the cost of living needs to be compared between Germany and the U.S. Repatriates may have to spend more or less money on everyday items upon return, so income and spending levels may need to adjust accordingly.

Family Concerns. Similarly to moving abroad, spouses and children should be taken into consideration when moving back home. Children may have been reluctant to leave for the host country, but have since made many friends during the years abroad. They may be anxious about going back to American schools, reconnecting with old friends, and developing new routines. Spouses may be thrown back into a position of looking for a job, as well as leaving behind friends they have made over the years abroad.

Not only does the spouse have to worry about finding employment, but the expat may have struggles in the workplace as well. Nearly 16% of employees leave their company within the first two years of returning home.² Many times, employees return from an international assignment to be placed in the same positions they were working before going abroad, leaving employees to feel underutilized. In addition, companies often do not give employees any re-orientation training when returning home, which is crucial for success to occur. The organization may have reshuffled top management, reorganized the reporting structure, or even reshaped the company culture.³

To combat this disconnect between employee experiences and organizational success, some companies have started creating long-term plans for employee placement before the expatriate even leaves for the assignment abroad. Employers are creating formal repatriation strategies to manage employees' careers and retention. Expatriates have irreplaceable experiences and knowledge that companies can leverage and utilize in organizational management.

Even though expatriation is a sometimes scary and unpredictable journey, the experiences and knowledge gained from doing so are completely worth the momentary and occasional stresses. The planning and research done to repatriate back to the U.S. is just as important as the

organizing done before the assignment abroad begins. Individuals who participate in expatriation will be richer in experiences had overseas and will be able to look forward to the reunion with their home country at the end of their journey.

Endnotes

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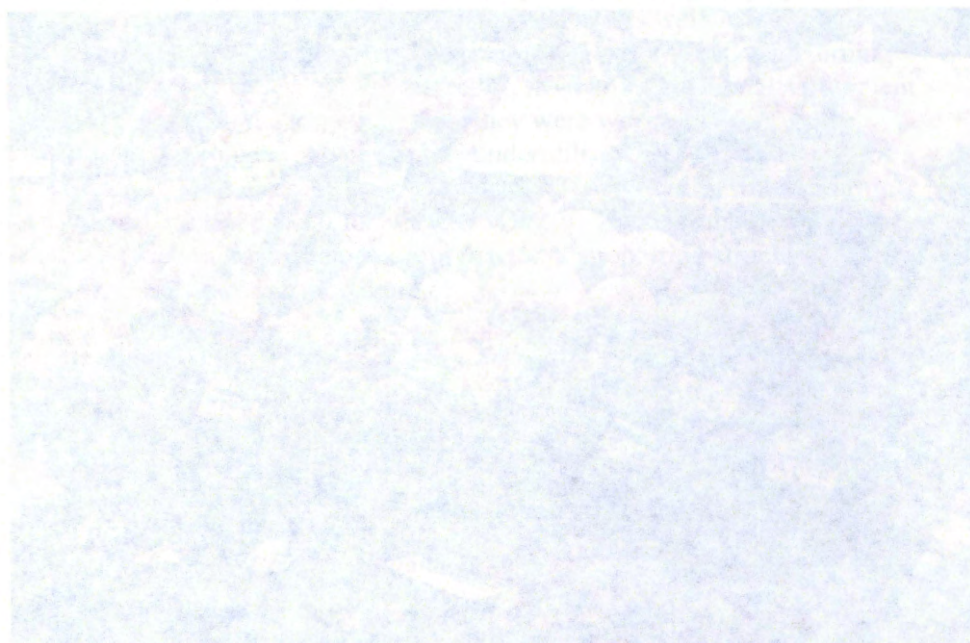


Figure 10.1: Fresh market in Frankfurt

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organizing information and participating in decision-making. The process of organizing information and participating in decision-making is a complex one, and it is one that is often overlooked in the study of organizational behavior. The process of organizing information and participating in decision-making is a complex one, and it is one that is often overlooked in the study of organizational behavior. The process of organizing information and participating in decision-making is a complex one, and it is one that is often overlooked in the study of organizational behavior.

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For the most part, the process of reintegration is a complex one, and it is one that is often overlooked in the study of organizational behavior. The process of reintegration is a complex one, and it is one that is often overlooked in the study of organizational behavior. The process of reintegration is a complex one, and it is one that is often overlooked in the study of organizational behavior.

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